

Admin Mode: Institution, Expense Category & Merchant

Personal Finance Institution:

1. Click on the **New** link in the 'Finance' area of your Dashboard.

Finance	
Institution	New List Import from Excel
Merchant	New List Import from Excel
Types and Categories	New List

2. On the **Create Institution** page, enter the required information such as Institution Name, Street, State, and Country. Then click on the **Save** button at the bottom of the page to store the information.

Create Institution			
Institution Information			
Institution Name *	<input type="text" value="Demo Institution"/>		
Remarks	<div style="border: 1px solid #ccc; height: 40px;"></div> <small>About 3000 characters left</small>		
Street 1 *	<input type="text" value="1st street"/>	Street 2	<input type="text"/>
City	<input type="text"/>	Zip Code	<input type="text"/>
Country *	<input type="text"/>	Other	<input type="text"/>
State *	<input type="text" value="NEW JERSEY"/>		
Phone 1	<input type="text"/>	Ext	<input type="text"/>
Phone 2	<input type="text"/>	Ext	<input type="text"/>
Fax Number	<input type="text"/>	E-mail	<input type="text"/>
Web Address	<input type="text"/>		
<input type="button" value="Cancel"/>		<input type="button" value="Save"/>	

3. You will then receive a Success Message.

	Successfully Saved.
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Personal Finance Expense:

1. Click on the **New** link in the 'Finance' area of your Dashboard.

Finance	
Institution	New List Import from Excel
Merchant	New List Import from Excel
Types and Categories	New List

2. Enter the information in the 'Label' and 'Description' fields on the **Types and Categories** page and click on the **Save** button.

Types and Categories

Type Information

Type *	Label *	Description
Expense	Bread	Food
Deposit		
Please Select Account Card		
Deposit		
Expense		
Unit		

If you want to add more row, click on "Add More"

Add More (+)

NOTE: To add more rows, click on the **Add More** button.

3. You will then receive a Success Message.



Merchant:

- To create a new Merchant, click on the **New** link in the 'Finance' area of Dashboard.
- Enter the data in the fields as required and click on the 'Save' button at the bottom of the page.

Finance	
Institution	New List Import from Excel
Merchant	New List Import from Excel
Types and Categories	New List

Create Merchant

Merchant Information

Organization Name *

Remarks

About 3000 characters left

Street 1 * Street 2

City

Country

Country * Zip Code

State * Other

Phone 1 ⓘ Ext

Phone 2 ⓘ Ext

Fax Number E-mail

Web Address

3. You will receive a Success Message when the data is saved.



Edit List of Institutions, Expense Categories or Merchants:

You can edit the list of Institutions, Expense Categories or Merchants from the respective lists.

For example: To edit an entry in the list of **Institutions**, follow the steps shown.

Finance		
Institution	New List Import from Excel	
Merchant	New List Import from Excel	
Types and Categories	New List	

1. On the **Personal Finance Institution** list, click on the name of the Institution.

Personal Finance Institution

Institution ▲	Entered By ◆	Entered Date ◆	Updated By ◆	Updated Date ◆
ABC Institution	Sophia Hayes, Provider Administrator	07/30/2012 02:16 PM		

One item found. 1

2. Make the necessary changes on the form and click on the **Save** button to update the form.

Edit Institution

Institution Information

Institution Name *

Remarks

About 3000 characters left

Street 1 * **Street 2**

City **Zip Code**

County

Country * **Other**

State *

Phone 1 ⓘ **Ext**

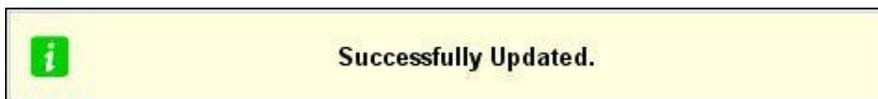
Phone 2 ⓘ **Ext**

Fax Number **E-mail**

Web Address

<< Back Cancel Save

3. You will then receive a Success Message.



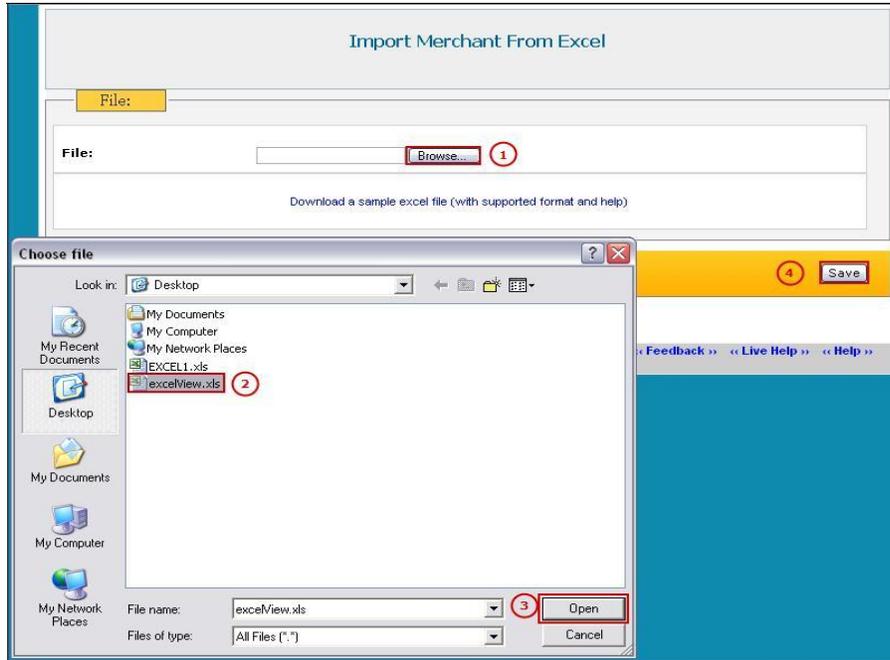
Importing Data from Excel Sheets:

You can import data directly into the forms from Excel Sheets.

For example, to Import Merchant from Excel sheets follow the steps shown below.

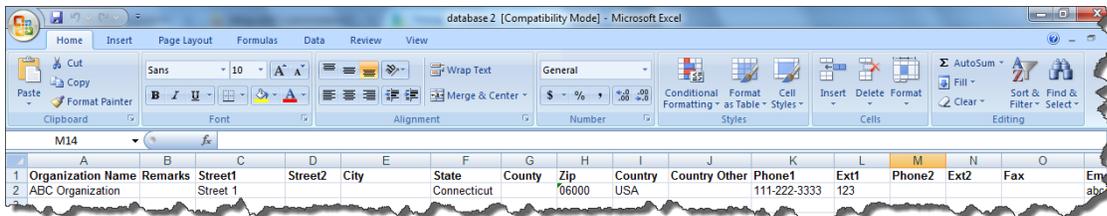
1. On your **Dashboard**, click on the **Import from Excel** link in the 'Finance' section.

Finance	
Institution	New List Import from Excel
Merchant	New List Import from Excel
Types and Categories	New List



2. To add the information from the Excel sheet, click on the 'Browse' button on the **Import Merchant From Excel** page. After selecting the file from your computer, click on the 'Open' button to add the file and then click on the 'Save' button.

NOTE: You can download a sample Excel file by clicking on the [Download a sample excel file \(with supported format and help\)](#). The Excel file to be uploaded should be written in the order shown in the sample Excel file.



3. The data will then be entered into the form automatically.

